

TEAM DECISION-MAKING PROTOCOL

Philosophy and Purpose

Team Decision Making (“TDM”) is a key strategy of the Family To Family Initiative that is implemented whenever a child has been removed or is at risk for removal, or whenever a placement change is contemplated. TDM describes a collaborative meeting process designed to produce the best possible decision concerning a child’s safety and placement. It provides for the joint contributions of DHS staff, family members, community advocates, service providers, foster parents and the family’s support network. During a TDM meeting, all participants work together to create a plan for safety or placement tailored to the individual needs of each child. The term “safety plan” refers to plans that prevent placement, while the term “action plan” refers to plans regarding out-of-home placement.

TDM arises from the belief that the well-being of a child is best served by an inclusive collaboration of family, community and child welfare agency rather than by a unilateral public agency decision. The TDM process establishes a forum to share ideas and opinions and to identify accessible, wraparound resources available as immediate supports in a family’s neighborhood. TDM philosophy embraces the importance of the family’s perspective and involvement, stresses full participation of all attendees, and encourages honest communication. Throughout the meeting process, TDM staff promote an atmosphere of dignity and respect. Achieving consensus among participants is a valued goal of the TDM process.

TDM meetings are used as an immediate intervention to prevent removal or to arrange kinship care if necessary. If an out-of-home non-relative placement is needed, the team decision reflects the least restrictive type of placement as dictated by the child’s needs. In each case, the ultimate objective is to preserve the family or to reunify parents and children in a safe manner as soon as possible.

For the benefit of the child and his/her family, non-relative placements are selected from foster parents available in the child’s neighborhood or community, as defined by the family’s affiliations. In this manner, a child is able to maintain close contact with family and friends and remain enrolled in his/her school while living in familiar surroundings. The TDM meeting initiates a team relationship between birth and foster parents that promotes reunification through support to parents and caregivers who live in proximity to one another.

For children who are removed from their parents, the Family To Family Initiative espouses the goal of one placement per child. Consequently, whenever a placement is threatened by disruption, TDM meetings focus on devising plans to support the current placement in order to prevent a placement change. TDM meetings are also used for permanency planning decisions and to enhance reunifications.

Goals

In conjunction with other central components of the Family To Family Initiative, TDM practice aims to accomplish the following:

- Reduce the number of removals through team-designed safety plans
- Place children with kin and/or in their own neighborhood or community
- Place siblings together
- Reduce reliance on institutionalized and group home care
- Place children in the least restrictive environment that addresses their needs
- Stabilize and preserve existing placements through caregiver support and services to children to achieve the target of 1 placement per child
- Create a team approach among foster parents, birth parents, service providers and the Department to promote reunification whenever possible
- Provide comprehensive services based in the family's neighborhood, connecting families to community supports that offer ongoing assistance
- Return the child home safely or provide permanency as soon as possible

While it is clear that not all of the above goals will be achievable at the start of TDM implementation, they provide direction to TDM practice as set forth by the Family to Family Initiative. For example, as the Family To Family Initiative develops in San Francisco, more foster parents will be recruited to assist in making the goal of neighborhood and community placements a reality.

Applications

The TDM meeting is used on a *mandatory* basis for consistency and accountability to create safety and placement plans for the following circumstances and stages of a case:

1. Emergency Removals
2. Potential Removals
3. Placement Preservation (applicable to *all* placement changes)
4. Permanency Planning
5. Reunifications

Guidelines for Referrals

(NOTE: once devised, add assessment tools to be used for each category)

1. Emergency Removals

When a child is removed from his/her home on an emergency basis, the Worker makes a TDM referral immediately and the TDM meeting is convened by the next business day. The TDM meeting must be held before the detention hearing.

2. Potential Removals

When the necessity for removing a child is in question, the assigned Worker consults with his/her Supervisor. If there is an imminent risk of removal, the TDM referral is made immediately and the TDM meeting is scheduled within 2 business days.

3. Placement Preservation (for *all* placement changes)

A TDM referral is made whenever a Worker determines in conjunction with his/her Supervisor that a child's placement is threatened by disruption or the Worker has received a 7-day notice from the care provider. A TDM referral is also made when the child's placement raises concerns regarding care and safety. In these situations, the TDM meeting will be scheduled within 3 working days. For a crisis situation, the TDM meeting will be scheduled within 2 business days.

4. Permanency Planning

A TDM referral is made when a Worker determines in conjunction with his/her Supervisor during the course of concurrent planning that reunification is unlikely and that a permanent plan will be required. The TDM will be scheduled before the next court hearing, and preferably within 5 business days.

5. Reunifications

A TDM referral is made when a Worker determines in conjunction with his/her Supervisor to commence extended or overnight visits preceding reunification or to return the child home. The TDM will be scheduled before the next court hearing, and preferably within 5 business days.

Assessment Tools

To be discussed/designed & eventually appended to protocol.

Uses of the tools shall correspond with: removals, placement disruptions, permanency planning, and reunification. (Refer to ER's current risk assessment tool as well as sample forms from other TDM sites.)

Decision-Making Rule

The TDM process aspires to reach decisions on the basis of group consensus. If group consensus cannot be attained, then participating DHS staff endeavor to reach consensus among themselves. If DHS staff cannot achieve consensus, then the attending Supervisor makes the decision. If there is no attending Supervisor, then the assigned Worker makes the decision.¹ Once the determination is made, it is adopted as the Department's official plan and fully supported by F&CS staff. It should be clarified that, with respect to the Department's mandate to protect children, the Team Decision-Making process does not alter the liability exposure of the Department.

Appealing a Decision

Only attending DHS staff may make an appeal. Appeal requests are not initiated simply because of a lack of consensus, but rather are limited to the following two conditions:

- 1) the perceived risk to a child is not adequately addressed by the TDM decision; and/or
- 2) the TDM decision is perceived as violating the law or DHS policy.

If either of these conditions apply, it is the *duty* of F&CS staff to request an Appeal.

Appeals are heard by an F&CS Program Manager, and whenever necessary, by the F&CS Deputy Director. Particularly for the benefit of the family, the intention to appeal should be stated at the meeting whenever possible. Under optimal circumstances, the Appeal should be held immediately following the meeting. If this cannot be done, meeting participants shall be notified and the Appeal held as soon as possible and within 24 hours.

The Facilitator arranges the Appeal. DHS staff, including the Facilitator, who were present at the TDM meeting are required to attend. Staff present their assessment of the issues in a format that is structured the same as a TDM meeting and facilitated by the TDM Facilitator. The Program Manager (or Deputy Director) then makes the final decision which becomes the agency's official position, binding upon all staff.

[Note: Management Team to formulate an appeals procedure that ensures the availability of a Program Manager or the Deputy Director and the mechanism by which TDM staff know who

¹ Casey Foundation emphasizes that the assigned Worker should make the final decision, not the Supervisor, when consensus among DHS staff cannot be reached. This procedure was revisited at the most recent TDM implementation group meeting. Group members indicated that, in practice, if a Supervisor disagreed with his/her Worker based on safety or policy issues, the Supervisor would be duty-bound to make an appeal. Consequently, TDM group members held the opinion that it made more sense for the appeal right and responsibility to remain with the assigned Worker, Facilitator or other DHS staff member. In this manner, families would be spared unnecessary Appeals and Supervisors would be exercising their customary oversight responsibilities. Further discussion is invited on this critical issue.

will be available on any given day. Should an alternate procedure be proffered for non-emergency Appeals or would this compromise customer service?]

Confidentiality

The TDM meeting is a private forum focused on achieving consensus regarding placement decisions. In this respect, TDM meetings are to be distinguished from investigations and should not be experienced by the family as an investigatory procedure. However, information shared at the meeting can be utilized for the creation of a case plan and/or for the development of recommendations for court orders. Mandated reporting laws as well as professional ethics apply to TDM meetings. These limitations on confidentiality are explained to participants at the start of TDM meetings.

The Management Team may want to consider, in consultation with the City Attorney's office, the pros and cons of consent/release forms specifically for TDM. Casey Foundation recommends against their use. DHS currently uses consent/release forms for Family Conferences at the advice and approval of the City Attorney's office. However, Santa Clara and other California counties practicing Family Conferencing do not.

Participants

TDM meetings invite the participation of parents, legal guardians, guardians ad litem, family members, the family's support network, foster parents, service providers, and child and community advocates. For example, family friends, clergy, public health nurses, CASAs, FFA workers, group home and residential care representatives, CalWORKs workers, teachers and other school staff are all included among those who could assist in formulating a team decision. (It should be noted that attorneys and court-appointed social workers are *not* included in TDM meetings.)²

Based on a child's maturity, cognitive-emotional status and the anticipated subjects to be discussed at the TDM meeting, the referring worker assesses the appropriateness of a child's attendance at the meeting. The worker considers if the child's attendance will benefit the child and the team. In some cases, it may be appropriate for a child to attend only a portion of a meeting. Teenagers are expected to attend unless the worker determines that participation would be detrimental to the teen. For children who do not have an identified advocate, the person(s) who serve as the child's best support shall be invited.³

The assigned Worker and a TDM Facilitator are *required* to attend. For cases involving emergency response Workers, if applicable, the assigned Worker may request that another

² Attendance of court-appointed social workers is under discussion by Management Team. Also, would there be any exceptions to prohibiting the attendance of attorneys (other than for observation purposes)? [Attorneys do not participate in Family Conferences.]

³ A question arose concerning whether or not a teen and/or parent would need to give consent for the participation of a child advocate.

emergency response Worker assisting with the investigation (a “buddy” Worker) also be invited to attend.

The policy regarding attendance of Supervisors, after-hours duty workers and any exceptions for Workers is still under consideration by the Management Team.

While it may be desirable for the after-hours duty worker to attend a TDM the following day, how would this be feasible?

Workers and Supervisors have requested clarification regarding court hearings or case emergencies that may conflict with their TDM attendance. It has been recommended that punitive measures not be used to enforce Workers’ attendance at TDMs. Will there be coverage behind Supervisors attending TDMs?

Please keep in mind that Workers and Supervisors who do not attend a TDM will not be able to change the decision or request an Appeal. With respect to the attendance of Supervisors, many suggestions have been offered to date. They are as follows:

- *Mandatory Supervisor attendance at all TDMs (Casey’s ideal)*
- *Require Supervisors to be present for all 7-day notices (question: in the implementation phase or in perpetuity?)*
- *Require Supervisors’ attendance for the first 6 months of the program. [Note: It is expected that ER and LTP will have more frequent TDMs than other units.]*
- *Specify the number of times a Supervisor needs to attend.*
- *Allow Supervisors within the same function to substitute for one another.*
- *If a Supervisor cannot attend a meeting, he/she should discuss decision options with the Worker prior to the TDM, since the Supervisor will not be able to change a TDM decision.*
- *Supervisor to accompany for 6 months new staff and reassigned staff who do not have experience with the function of their new unit.*
- *Once Supervisors themselves have sufficient direct experience participating in TDM meetings, Supervisors may attend at their discretion on a case-by-case basis based on the need to support and guide the Workers of their unit.*

Role of DHS Staff Participants

DHS staff participants include the **Facilitator**, the **Protective Services Worker** and the **Protective Services Supervisor** assigned to the case. Each performs a unique role before, during and after the TDM meeting. Their functions and duties are described below.

Facilitator

Function:

The role of the Facilitator is to assist the TDM Team to develop a safety or action plan, specifically regarding a child’s placement, through assessment, brainstorming, negotiation and consensus-building. By upholding the goals of TDM practice as noted above, the Facilitator proactively guides the TDM Team to produce a safety or action plan that reflects the family’s strengths and incorporates community resources to secure the safety and well-being of the child, whether at home or in out-of-home placement. The first priority is to preserve the family by

preventing placement. However, if out-of-home care is necessary, the second option is always the *least restrictive* available placement. Relatives placements and non-relative extended family member (“NREFM”) placements are considered first. If a child cannot be placed with relatives, then placement with a foster parent in his/her neighborhood or identified community is considered next. Mandatory clearance procedures shall be followed for all placements.⁴

The Facilitator assists the assigned Worker to manage the TDM meeting. The Facilitator directs the process and structure in a manner that promotes an inclusive, safe and supportive environment. The Facilitator models respectful interactions, active listening skills, flexibility and quality customer service. He/she focuses on family strengths, quells blaming and shaming, and insures that every participant has opportunities to speak and to be heard.

The Facilitator clearly explains the purpose and the ground rules for the meeting, elicits information from the participants, defines the problem and fosters carefully considered collaborative decisions based on a thorough examination of the issues. The Facilitator may need to manage conflict and strong emotions as these arise by utilizing conflict management skills. He/she keeps participants on task in order to complete the planning process within 1.5 to 2 hours. At the completion of the meeting, the Facilitator accurately records TDM information and decisions on designated forms and provides a copy of the safety/action steps to all participants. The Facilitator also indicates on the appropriate form⁵ whether or not he/she recommends that the family be offered a follow-up Family Conference. Once a Facilitator is assigned to a family, the Placement Unit will assign the same Facilitator to all subsequent TDM meetings for that family as consistently as possible.

The Facilitator is expected to maintain a broad knowledge of DHS policy, procedures and agency resources available to clients. Utilizing this experience, the Facilitator has responsibility for the outcome of the TDM meeting and is required to intervene in the meeting process to ensure that DHS policies and the safety of the child are addressed in the safety or action plan. The Facilitator (as well as any other DHS staff) may request an Appeal of any safety or action plan that he/she believes jeopardizes the safety of a child or violates law or DHS policy.

Preparation:

The Facilitator reviews the TDM information form⁶ prior to the meeting, and makes arrangements to address any special needs and/or safety issues regarding the participants. The Facilitator may also choose to consult with the referring worker prior to the TDM meeting, although this is *not* recommended for removals or potential removals when prior consultation might tend to bias the Facilitator. The Facilitator also prepares the meeting room, including supplies and materials that participants need. On a daily basis, the Facilitator shall review placement vacancies by consulting with a Placement Coordinator or by checking the vacancy book.

⁴ If Management Team can propose an appropriate and legal procedure to expedite clearances for relative homes, this will assist the F2F goal of one placement per child.

⁵ Once devised, the name of the form will be substituted here.

⁶ Once devised, the name of the form will be substituted here.

Post-meeting Duties:

After the TDM meeting, the Facilitator enters data required for the TDM database. Whenever possible, the Facilitator and other DHS participants are encouraged to debrief with one another in order to share successes and to assess and strengthen the quality of TDM meetings in serving families and children.

Ancillary Duties:

In addition to hosting TDM meetings, the Facilitator participates in intra- and interagency committees to exchange information and to develop TDM practice consistent with the needs of the community and high professional standards. The Facilitator also meets regularly with his/her Supervisor to discuss TDM practice issues. Since the Facilitator encounters a wide spectrum of family circumstances, the Facilitator is also expected to identify any DHS practices that inadvertently hinder the goals of TDM and the Family To Family Initiative so that they may be revised accordingly. In this manner, the TDM Facilitator is considered as a support to Supervisors and Managers.

Referring Protective Services Worker (“PSW”)⁷

Function:

The assigned PSW manages the TDM meeting with the assistance of the TDM Facilitator. Early in the meeting process, the PSW presents to family members and all other participants the observed strengths of the family and the concerns of the Department, drawing from a completed assessment tool appropriate to the type of TDM. In addition to sharing his or her own opinions regarding safety or action planning, the PSW shall maintain receptivity to the ideas expressed by other participants and shall work as a team member to discuss and formulate the plan. If consensus among all participants or among DHS staff cannot be reached, the attending Supervisor makes the decision. If there is no attending Supervisor, then the PSW makes the decision. The final determination then becomes binding upon F&CS staff, unless it is overturned by the outcome of an Appeal initiated by the PSW, Facilitator or other DHS staff who participated in the meeting.⁸

Preparation:

The PSW consults with his/her Supervisor when he/she determines that convening a TDM meeting is or may be necessary. If the consultation indicates that the family’s situation meets the criteria for a TDM meeting, the Worker notifies the Placement Unit. Upon the Worker’s notification, the Placement Unit assigns the date, time and location for the TDM meeting. In advance of the meeting, the PSW completes the assessment tool appropriate for the type of TDM to be held. The referring Worker may also consult with the Placement Coordinator regarding available placement options prior to the TDM meeting.

The PSW invites parents, legal guardians, family members, relative caregivers, foster parents, FFA, group home or residential care representatives and other relevant service providers with whom he/she has routine contact. The Worker also prepares the family for the meeting and

⁷Management Team to determine policy regarding after-hours workers’ duties/participation re TDM; section to be added to protocol.

⁸ Please refer to the earlier footnote concerning the decision-making rule

encourages them to bring additional relatives and support persons to the meeting. The Worker identifies for the Placement Unit the DHS staff to be invited by the Placement Unit and informs the Placement Unit if the family will need a community advocate. *It is critical that the Worker also alert TDM staff at the time of intake (or as soon as known) about any safety issues, such as domestic or other violence, threats or the existence of any restraining orders affecting participants.*

The PSW identifies any special needs that the family has relating to their attendance at the TDM meeting, including such concerns as language interpretation, wheelchair access, childcare and transportation and discusses relevant options with the family. (The Placement Unit will assist with language needs and wheelchair accessibility, but has limited options with regard to transportation and no assistance for childcare at the time of this writing.⁹)

Post-meeting Duties:

Immediately after the conclusion of the TDM meeting, the Worker consults with the Placement Coordinator regarding any placement change to be made to a non-relative placement. The Worker also follows through with items indicated in the safety or action plan as recorded in the TDM meeting. For removals and placement changes, the Worker arranges the “Family Team Meeting”, a meeting between the parent(s), foster parent(s) and Worker that usually occurs at the time of the first visit after a detention hearing or placement change. Family Team Meetings are held to nurture the development of a team relationship between birth parents and foster parents that will support reunification and informed care of the child. The protocols and procedures for Family Team Meetings will be set forth in a separate document.

Supervisor of Referring Worker:

Function:

The Supervisor jointly determines with the assigned Worker if a TDM meeting should be convened. Prior to the TDM meeting, the Supervisor consults with the PSW to identify risks, family strengths and other issues concerning placement. The Supervisor shall remain receptive to opinions and ideas offered by other participants during the TDM meeting. After a thorough assessment of the family’s situation, the Supervisor assists in the formulation of the safety or action plan. If consensus among participants or among DHS staff is not achieved, the Supervisor makes the final decision. If the Supervisor does not attend the meeting, he/she cannot change the decision or make an Appeal.

Role of Other Participants

Birth Parents

Parents are asked to invite to the TDM meeting other relatives or support persons of their choosing. The Facilitator welcomes the family and, if applicable, the Community Advocate

⁹ Awaiting determination of Management Team

introduces himself/herself to the family immediately prior to the meeting. At this time, the parents decide whether or not they would like the Community Advocate to participate. Parents and other family members are escorted into the meeting room prior to other participants. During the meeting, the Facilitator invites the parents and family members to speak first.

Incarcerated Parents¹⁰

(possible statement to be written regarding utilization of Friends Outside...)

Foster Parents and FFA, Group Home or Residential Care Representatives (“care representatives”)

Foster parents and/or care representatives (as indicated above) are requested to participate in TDM meetings that are held after a child is already in placement, for example, when the placement is likely to be disrupted, or when making decisions regarding permanency or reunification. With respect to children who have recently been removed, foster parents would not be invited to participate in TDM meetings until *after* a detention hearing.

Function:

Foster parents and care representatives are valuable members of the TDM team. By participating in TDM meetings, they further develop a partnering relationship with the child’s family. Through this partnership, foster parents and care representatives can assist birth parents in the family’s transition towards a successful reunification. During the course of the meeting, foster parents and care representatives can express their views about the child’s needs while increasing their knowledge about the child and his/her family.

The Community Advocate

As the Family To Family Initiative is developed in San Francisco County, community advocates will be identified who represent neighborhoods or communities where child welfare cases occur. Until such advocates are designated, the Placement Unit or PSW can invite staff from agencies who already serve the family or support persons who can help the family to access community-based services.

Function:

The Community Advocate functions to identify services within the family’s neighborhood or offered through a community with which the family is affiliated. The Community Advocate shall be knowledgeable about the services that can be offered to a particular family, functioning as a liaison between the family and the individual community agencies. The Community Advocate shall seek community supports that provide both short-term and ongoing assistance.

If the family does not have a Community Advocate prior to a TDM, the assigned Advocate introduces himself/herself to the family immediately before the start of the meeting, asking the family if they want him/her included in the TDM meeting on their behalf. Community Advocates are not told the name of the family in advance of the meeting to preserve

¹⁰ For Management consideration.

confidentiality. If the family is agreeable to the Community Advocate's participation, the Advocate offers valuable assistance regarding the creation of the safety or action plan.

Post-Meeting Duties:

Once services have been identified in the safety or action plan, the Community Advocate will help to execute the plan by assisting the family to obtain those services.

Placement Unit Staff

Placement Unit Supervisor:

(Question: change title?)

In addition to other duties customarily associated with a supervisory position at Family & Children's Services, the Placement Unit Supervisor (the "Supervisor") oversees the TDM Facilitators, the Placement Coordinators, the Placement Unit Clerk and the Family Conference Specialists. The Placement Unit Supervisor recommends TDM policies and procedures and manages their day-to-day implementation. The Supervisor shall have an active role in shaping TDM practice by considering the experiences of DHS staff, family members, foster parents and other key TDM participants as TDM practice evolves.

The Supervisor provides consultation and instruction to the Placement Unit Clerk in assigning Facilitators. One objective of the consultation is to maintain a caseload balance among Facilitators that reflects all TDM meeting types (removal, placement preservation, permanency planning and reunification). *The Supervisor also reviews with the assigned Facilitator any cases involving safety and added security measures, including cases involving domestic or other kinds of violence, physical threats and restraining orders.* In addition, the Supervisor regularly holds debriefing sessions with Facilitators about recently conducted TDM meetings and assists in arranging additional trainings for Facilitators as needed. The Supervisor oversees the documentation of TDM meetings and the maintenance of the TDM database. When necessary, the Supervisor serves as a back-up Facilitator.

TDM Facilitators

The role of the TDM Facilitator has already been discussed in detail above.

Placement Coordinators:

(Question: change title?)

The referring Worker confers with the Placement Coordinator regarding the availability and type of non-relative out-of-home placements that will best meet the child's individual needs in the least restrictive setting. This consult shall always occur immediately after a TDM meeting when the action plan requires out-of-home non-relative placement, and can also occur as part of the referring Worker's preparation to learn about placement options prior to the TDM meeting. The Facilitator may also ask the Placement Coordinator about current vacancies in preparation for a meeting. The Placement Coordinator also performs duties that have been customarily associated with arranging placements.

Placement Unit Clerk:

(Question: change title?)

The Placement Unit Clerk (the “Clerk”) receives incoming requests for TDM meetings, whether by telephone, e-mail or fax, and acquires from the referring Worker the basic information necessary to prepare the Facilitator for conducting the meeting. The Clerk provides an immediate response to the referring Worker stating the date, time and location set aside for the TDM meeting. According to standard TDM scheduling procedure, the Clerk allots a total of two time slots each day to accommodate emergency removals or emergency placement changes.

During the initial contact with the referring Worker, the Worker indicates who should attend the meeting. The Clerk proceeds to invite to the meeting providers, support persons, community advocates or DHS staff who will *not* be contacted by the referring worker. As time permits, the Clerk shall assist in notifying family members when the Worker, parents, or relatives are unable to do so themselves. (As noted earlier, the referring Worker invites the parents, legal guardians, caregivers or other care representatives and other providers with whom he/she is in regular contact.)

The Clerk also seeks information from the referring Worker and the invited participants regarding special needs (such as interpreters, wheelchair access, childcare, transportation, etc.). *The Clerk also asks the Worker if there are any safety concerns (e.g., domestic or other violence, threats and/or restraining orders) associated with the participants. It is critical that the Clerk report all safety concerns to the Placement Unit Supervisor and the assigned Facilitator. Under the direction of the Supervisor, the Clerk arranges for heightened or additional security, as needed.*¹¹

In consultation with the Supervisor, the Clerk assigns cases to Facilitators. The Clerk also serves as a coordinator for matters pertaining to TDM meeting sites. Additionally, the Clerk performs data entry and maintains files as required by the Placement Unit.

Family Conference Specialists

The practices of TDM meetings and Family Conferencing shall complement each other. Family Conferencing Specialists shall continue to develop the Family Conferencing Program in addition to coordinating and facilitating Family Conferences. As distinguished from mandatory TDM meetings, Family Conferences will continue to be offered on a *voluntary* basis for a variety of issues, including, but not limited to, comprehensive case planning, visitation arrangements, and the provision of supportive services to parents, children and relative caregivers. Protocols and procedures for Family Conferencing are described in a separate document.

With respect to TDM practice, Family Conferencing Specialists shall serve, as needed, as back-up Facilitators for TDM meetings. Additionally, when a TDM Facilitator indicates on the

¹¹ Issues pertaining to security are under consideration by the Management Team. It is currently understood that DHS can hire security guards for external meeting sites when justification is provided in advance. How would this be arranged?

designated form that a family should be offered a follow-up Family Conference, a Family Conferencing Specialist will pursue this recommendation with the assigned Worker. Family Conferencing Specialists shall also provide cross-training in Family Conference facilitation to the TDM Facilitators.

Scheduling & Notification

Procedures for scheduling and notification are currently under discussion by the TDM Section Manager, Supervisor and implementation group, and will be forthcoming shortly. Additionally, the TDM implementation group has been advised that Workers and Supervisors cannot be mandated to attend after-hours meetings.

Meeting Sites¹²

At the time of this writing, meeting sites in Departmental offices are in the process of being secured. Additionally, neighborhood-based meeting sites are also being explored. It is anticipated that wheelchair accessible sites will also be made available.

Sites reserved for TDM use shall be dedicated to that purpose so that they can be relied upon to be available for emergency as well as pre-planned meetings. The sites should offer adequate, comfortable seating in quiet, private settings. The sites should also afford access to telephones, a copier and, if possible, a networked computer for DHS sites.

Safety and Security¹³

Security is provided at all DHS meeting sites during the hours of ____ to ____.¹⁴ As indicated above, the referring Worker alerts the Placement Unit Clerk about any safety issues associated with TDM participants as soon as the Worker becomes aware of such concerns. The Placement Unit Clerk then notifies the Placement Unit Supervisor and the assigned Facilitator. In consultation with the Placement Unit Supervisor, the Clerk arranges for additional security measures to be implemented at the meeting site. The Placement Unit Clerk shall notify security guards at DHS meeting sites about matters related to participant safety for meetings held in DHS offices. For meetings in neighborhood locations, safety measures may include the hiring of a security guard. In such cases, the Clerk provides advance notice and justification to _____ for this requirement.¹⁵

¹² To be arranged by Management Team staff

¹³ Security arrangements to be made by Management. Contracting for additional security guards and other security devices are under consideration.

¹⁴ Is this true? What are the hours? Are they the same for every DHS site? With respect to the availability of security guards, how late will TDM meetings be able to be offered in the evenings?

¹⁵ Procedure to be specified by Management. Shall this be initiated by the Clerk or by the Supervisor?

Family members who pose emotional trauma or a physical threat to other family members may not be able to be present at the TDM meeting. *Restraining orders are always observed.* When, for safety reasons, it is not appropriate for a family member to attend, other arrangements, such as a separate meeting, participation by telephone or through correspondence, may be made.

Interpretation and Translation Services¹⁶

The referring Worker alerts the Placement Unit Clerk regarding the language needs of participants, including the number of persons who require services. Spanish-speaking families will be assigned to Spanish-speaking Facilitators. For other languages, the Clerk will proceed to arrange for services with Language Bank. In some cases, it may be possible for interpretation services to be provided by DHS staff.¹⁷

Transportation

Transportation assistance can be offered to family members and support persons in the form of taxi vouchers and MUNI passes.¹⁸ At this time, DHS staff are not available to serve as transporters.

Childcare¹⁹

Childcare services for court-dependent children shall be arranged by the Worker through customary procedures for approved respite or alternate care.²⁰ If childcare services are not available, the Worker shall advise the family, when notified about the meeting, to make alternate care arrangements for children who are not dependents of the court. The Facilitator shall have available children's toys and coloring books to keep children entertained in the meeting room in the event that family members with no other recourse bring children to the meeting.²¹

¹⁶ Arrangements with Language Bank to be pursued by Management. How will families be provided with *written* action plans in their native languages? Standard safety/action plan forms will need to be translated into Spanish.

¹⁷ Is this advised? How would it be arranged? Utilizing staff with other responsibilities may not prove reliable.

¹⁸ Management Team needs to advise regarding the process to obtain taxi vouchers and MUNI passes for TDMs.

¹⁹ Childcare possibilities are currently being explored, including the 170 Otis 1st floor childcare room. Additionally, Management can also explore the use of Case Aides.

²⁰ This has never been discussed, but is practiced for Family Conferencing. However, in Family Conferencing, Workers have more lead time to make childcare arrangements for dependent children.

²¹ Actually, the Program Manager for TDM has already advised "children should not attend TDM meetings until we can guarantee funding and/or childcare resources to address these issues." Until this issue is resolved, how shall we proceed when children are brought to TDM meetings against the instruction of the Worker?

TDM Meeting Process and Structure

This section of the protocol will be based upon the Casey training for facilitators that was provided to TDM staff in November 2002. Among other topics, it will include a discussion of participants and content specific to each type of TDM.

[Note: Duration of TDM meetings is 1.5 – 2 hours]

Implementation Phases of TDM

PHASE ONE: PLACEMENT PRESERVATION

Description:

Phase One shall focus on preserving existing placements by preventing placement disruptions or by reinstating disrupted placements whenever possible and appropriate. This phase will also include disruptions of non-finalized adoptions and children returning from AWOL status.

Phase One Timelines

0-4 Months of Implementation and Thereafter:

TDM meetings for *non-emergency* situations relating to the preservation or change of an existing placement shall begin at the start of TDM implementation and constitute the only type of TDM to be held for the first 4 months of TDM practice. (TDM meetings for placement preservations shall also include children who might be moved from one Level 12 placement to another Level 12 placement.)

At Month 5 of Implementation and Thereafter:

1) TDM meetings for *emergency* situations, including mental health crises relating to the preservation or change of an existing placement begin at month 5 of TDM implementation.

2) TDM meetings involving children who may require *changes in the levels of placements under Level 12* also begin at month 5 of TDM implementation.

(If a Worker seeks a placement at Level 12 or higher, the Worker shall attend PARC instead of requesting a TDM meeting. This function of PARC may be eliminated in the future as TDM practice progresses.)

Triggers for Phase One:

- Based upon conversations and contact with caregivers, children and/or other providers, the Worker determines that a placement is becoming unstable and in danger of failure.
- The Worker believes that the issuance of a 7-day notice is imminent.
- The Worker is in receipt of a 7-day notice.
- The Worker has safety concerns about a child's placement.
- The Worker believes that a child's needs are not being met in his/her current placement.

- The child has stated that he/she wants to change placements for reasons affecting his/her welfare.
- A child returns or is returned to the Child Protective Center after being AWOL.
- The Worker recommends that a child needs a change in the level of care (excluding a change to a Level 12 or higher placement that shall be handled through PARC).

Procedure:

The Worker consults with his/her Supervisor to confirm the need for a TDM meeting. After jointly determining that a TDM is necessary²², the Worker notifies the Placement Unit Clerk. The Unit Clerk schedules the TDM within 3 business days of notification for a non-emergency situation or within 2 business days for a crisis situation. Upon receiving the Worker's notification, the Unit Clerk informs the Worker of the date, time and place of the meeting. The Worker's notification and the Unit Clerk's response may be made by telephone, fax or e-mail.

The Worker notifies the parents, legal guardians, caregivers and providers with whom he/she has regular contact. The Worker encourages the parents to notify other family members and support persons. As time permits, the Placement Unit Clerk will notify additional family members if the Worker, parents or relatives are not able to do so. The Clerk also invites additional DHS staff as indicated by the Worker as well as a community advocate, if available.

In advance of the meeting, the PSW completes a TDM assessment pertaining to placement preservation or placement change that he/she shall present at the meeting.

For additional details regarding procedure, please refer to the sections "Role of Referring Worker" and "Scheduling and Notification" on pages __ and __, respectively.

**PHASE TWO: EMERGENCY AND POTENTIAL REMOVALS/
PREVENTING PLACEMENT**

Description:

Phase Two shall focus on emergency removals or potential removal situations that result from a hotline referral or that occur at any stage of an open case. This phase shall also include removals or removal risks pertaining to finalized adoptions and guardianships.

Phase Two Timeline

At Month 7 of Implementation and Thereafter:

TDM meetings for removals or potential removal situations shall begin at month 7 of TDM implementation. (Emergency Response Workers are encouraged to refer cases beginning in month 5 on a *voluntary* basis in order to become more comfortable with the TDM process.)

The goal of the TDM team is to prevent placement if possible by instituting a safety plan approved through the decision-making rule. If placement is necessary, the task of the TDM team

²² Should it be clarified that if Worker & Supervisor do not agree, the Supervisor's decision takes precedence?

is to determine the least restrictive placement appropriate and available at the time that the decision is made. Please refer to the “Goals” section above.

Triggers for Phase Two:

- The Worker determines that it is necessary to remove a child immediately.
- The Worker determines that removal may become necessary if an adequate safety plan is not developed and followed.

Procedure:

The Worker consults with his/her Supervisor to confirm the need for a TDM meeting. After jointly determining that a TDM is necessary²³, the Worker notifies the Placement Unit Clerk. The Unit Clerk schedules the TDM for the same or next business day for a removal that has already occurred, or within 2 business days for potential removals, *but always before the detention hearing*. Upon receiving the Worker’s notification, the Unit Clerk informs the Worker of the date, time and place of the meeting. The Worker’s notification and the Unit Clerk’s response may be made by telephone, fax or e-mail.²⁴

The Worker notifies the parents, legal guardians, caregivers and providers (if applicable) with whom he/she has regular contact. The Worker encourages the parents to notify other family members and support persons. As time permits, the Placement Unit Clerk will notify additional family members if the Worker, parents or relatives are not able to do so. The Clerk also invites additional DHS staff as indicated by the Worker as well as a community advocate, if available.

In advance of the meeting, the PSW completes a TDM risk assessment pertaining to removals that he/she shall present at the meeting.

For additional details regarding procedure, please refer to the sections “Role of Referring Worker” and “Scheduling and Notification” on pages __ and __, respectively.

²³ Should it be clarified that if Worker & Supervisor do not agree, the Supervisor’s decision takes precedence?

²⁴ Procedures for after-hours notifications will need to be fine-tuned before finalizing this protocol.

PHASE THREE: REUNIFICATIONS AND PERMANENCY PLANNING²⁵

Description:

Phase Three shall focus on decisions concerning reunifications and permanency planning.

Phase Three Timeline

At Month 10 of Implementation and Thereafter:

- 1) TDM meetings for reunifications shall begin in month 10 of TDM implementation.
- 2) TDM meetings regarding permanency planning decisions shall begin in month 12 of TDM implementation.

Triggers for Phase Three:

For Reunifications:

- When a Worker determines with his/her Supervisor that a child is to begin extended or overnight visits with his/her parents in preparation for reunification.
- When a Worker determines with his/her Supervisor that a child is to be returned home.

For Permanency Planning:

- When, during the course of concurrent planning, a Worker determines with his/her Supervisor that it is unlikely that a child will be reunified with his/her parents or legal guardian and that a permanent plan will be required.
- When reunification services have been terminated, but prior to a .26 hearing.

Procedure:

The Worker consults with his/her Supervisor to confirm the need for a TDM meeting. After jointly determining that the timing is appropriate for a TDM²⁶, the Worker notifies the Placement Unit Clerk. The Unit Clerk schedules the TDM preferably within 5 business days of notification, but always before the next court hearing.²⁷ Upon receiving the Worker's notification, the Unit Clerk informs the Worker of the date, time and place of the meeting. The Worker's notification and the Unit Clerk's response may be made by telephone, fax or e-mail.

The Worker notifies the parents, legal guardians, caregivers and providers with whom he/she has regular contact. The Worker encourages the parents to notify other family members and support

²⁵ *It should be noted that because of Family Conferencing's strong emphasis, lengthier preparation and more comprehensive treatment regarding the involvement of extended family members and support persons, as well as its reliance on families creating their own (approvable by DHS) plans, Family Conferencing is often ideally suited for supporting reunifications and for making permanency planning decisions. Perhaps, before this phase is implemented, more thought should be given as to how TDM meetings and Family Conferencing can most effectively interface to best serve families with respect to reunification and permanency planning.*

²⁶ Should it be clarified that if Worker & Supervisor do not agree, the Supervisor's decision takes precedence?

²⁷ In many cases, it is actually beneficial *not* to rush a permanency planning meeting in order to allow greater participation by relatives and to provide them in advance with information necessary to make informed decisions. The 5-day scheduling mandate may not necessarily be the best way to proceed.

persons. As time permits, the Placement Unit Clerk will notify additional family members if the Worker, parents or relatives are not able to do so. The Clerk also invites additional DHS staff as indicated by the Worker as well as a community advocate, if available.

In advance of the meeting, the PSW completes a TDM assessment pertaining to reunification or permanency planning, as appropriate, that he/she shall present at the meeting.

For additional details regarding procedure, please refer to the sections “Role of Referring Worker” and “Scheduling and Notification” on pages ___ and ___, respectively.

Choosing the Right Meeting

This section will comment briefly on the distinctions between PARC, Family Conferencing, MDTs and Administrative Reviews. However, it is recommended that in the future a visual or textual tool be created to represent a continuum of team meeting formats utilized by F&CS.

PARC shall continue to approve placements for Level 12 and higher in conjunction with its customary counterparts in other agencies. It is anticipated that as TDM progresses, TDM will be able to substitute for PARC with respect to Level 12 placements. PARC shall also continue to be utilized for Workers seeking adoptive homes as a permanent plan, until TDM assumes this function.

Documentation for TDM Meetings²⁸

The TDM implementation group in connection with the Self-Evaluation implementation group is beginning to devise documentation necessary to track TDM meetings and to establish a TDM database.

TDM Meeting Supplies

The following supplies are needed to perform the work required by TDM practice:²⁹

- Speakerphones
- Fax
- Copier
- Computers/4 laptops for use by Facilitators at community-based locations
- Tables & chairs
- Nametags
- Large Calendar for posting by Placement Unit Staff
- Take-home calendars for families

²⁸ In process of development by TDM and Self-Evaluation Implementation Groups and Casey staff; samples from other counties have been provided to the TDM Group.

²⁹ Certain supplies will require special preparation in conjunction with other DHS staff, such as brochures, promotional and reference materials, and laminated ground rules. Special order and expensive items will require management level approval.

Tissues
Pens
Paper
Easels & markers
Ground rules (laminated, posted)
DHS information brochures
Reference Books/Pamphlets for community-based services
Refreshments
Coloring Books/Children's toys

Protocol Exceptions

Any exceptions to this protocol shall be made at the Program Manager or Deputy Director level on a case-by-case basis by referral through a Section Manager.